

## 0076 Counseling and/or Coaching with Lee Chaix McDonough

You're listening to the Abundant Practice Podcast. Where we work through the stuck places folks hit while building their private practices. Each week we dive into a practice building through different lenses. You'll get trainings, listen in on mini-consultations and conversations with other consultants. Each month there is a niche deep dive where we flush out a niche from a marketing perspective. Plus, every now and then we throw in a "Where are they now" episode and check in on the clinicians who were on before to see how the advice played out. When relevant, the show notes will include a worksheet for you to bring the content into your practice or life. Because I love you listening, but I want you to take action, too.

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Welcome to the Abundant Practice Podcast. I'm your host, Allison Puryear. And I'm really psyched to have Lee Chaix McDonough from Caravelcoaching.com. She's a party member and she's been really helpful in helping some of our party members think through this whole coaching versus counseling thing. And how to do it ethically and whether or not it's for them. Lee, you're just full of knowledge and information. And I'm so grateful for you. So, first, welcome.

**Lee:** Thank you. I am so excited to be here. I've been a fan of yours for years. And so this is just super exciting for me.

**Allison:** Yay! So, can you talk to us a little bit about your journey with the counseling, coaching process?

**Lee:** Absolutely. So, I have been a social worker for a little over 15 years. Licensed for over 10 of those. And, my husband is an Air Force veteran. So, for much of my career, I was moving around quite a bit. And doing all sorts of social work and therapy with all sorts of populations which was great. But about three years ago when we made the decision for him to get out of the Air Force and we settled back in North Carolina, I took a break to help my family transition. We had been living in Germany for about four years, so that was a huge transition. From Europe to the States. From active duty to civilian life. So, I really focused on my family for about 9 months. Just helping them make the transition. And after that period of time, I started getting a bit of an itch. That I was really missing that professional identity. I missed working with people. And, I knew though, that mental health wasn't exactly where I wanted to be at this stage of my career. Meanwhile, I am watching my husband who is this really gifted clinician. He's a periodontist. So, that's a dental specialist. He had bought a practice here in North Carolina, and despite being amazing with patients and the actual work of dentistry, the idea of being a business owner and running a business was completely new for him. That was not something he had learned in the Air Force. It's certainly not something they taught in Dental School. So here I'm watching this incredible man really struggle. And, I'm watching him just lose

confidence. And I start realizing that he is not alone. He may think he's alone, but he's not alone. There are so many talented health care professionals out there who are really good when they are working with their clients. But when it comes to working on their business, that's where they start really doubting themselves. And, so when I started looking in to, well how could I serve this population, this is something I feel really strongly about, what I realized was that therapy might not necessarily be the path that these professionals are looking to follow. But coaching certainly was. And the more research I did about coaching, the more I realized, not only does it meet the needs of the people I want to work with, but my background as a therapist marries really well with it. So that's when I started Caravel Coaching. That's when I completed a coach training program. And now that's what I do. I help therapists, coaches, health care professionals of all stripes feel as confident working in their business as they do on their business. And that's kind of what brought me into coaching.

**Allison:** I love that. And I love that, I mean, it was somebody you saw every single day. What an intimate knowledge of, this man is amazing at what he does. And the business is not necessarily reflecting that. And I think a lot of private practitioners are in a similar space of, they know that they are great with clients when they are not stuck in imposter syndrome. They know they are great with clients, but the business is not picking up at the rate that they had expected or hoped. So, yeah.

Well, you and I were talking about these common questions. Because you and I both get this question a lot of what's the difference between coaching and therapy? And can I just say, Allison Puryear, counseling and coaching? And that kind of stuff. So, I would love for us to dive into that. Could I lob some common questions at you that we discussed?

**Lee:** Yes, please! Let's do this!

**Allison:** So, what would you say are the biggest differences between coaching and therapy? And how do you communicate that to clients?

**Lee:** Yes. So, I will tell you something that I hear a lot that drives me crazy. And that is, therapy focuses on the past and coaching focuses on the future. And that, oh my gosh, every time I hear that, it just drives me crazy. Because I think it's pretty simplistic and reductive and it doesn't do justice to the work of both professions. Yes, as therapists we are particularly adept at helping our clients explore their past and uncover patterns and make connections. But I know a lot of therapists that are just as forward thinking and really focused on solution and goal setting as an approach as I do coaches. So, I want to move away from this therapy equals past, coaching equals future perspective?

**Allison:** Oh, preach! Yes!

**Lee:** Thank you. Because there is some confusion between what therapy is and what coaching is. Because there is a great deal of overlap. Certainly, coaching is influenced by psychology. That is one of the areas from which coaching draws skills and techniques. But it's not the only area. They also bring in elements of human resource management. Of organizational development, even spiritual practices. So, coaching really can be an eclectic approach. Certainly, skills such as active listening, open ended questions, reframing, challenging, mirroring, we're going to find those in both coaching and therapy. But, I think what really makes it different, is certainly, who

we are working with. Therapists are the ones who are particularly skilled and licensed to be working with people who have diagnosable mental health disorders. And when I talk to other coaches, I'm really clear that if there are symptoms that are interfering with the day to day functioning of a client, they are really not able to function. Then, that is where you need to refer to a therapist. That client may not necessarily be appropriate for coaching today. Down the road, we can talk. But right now, if they are having significant impairment, that is not the role of a coach. That's really where a therapist comes in.

I think also, when we're looking at the process, therapy falls under the umbrella of health care. It is certainly a deep dive into one's past to resolve current dilemmas, or it could be. Whereas, coaching does tend to be less past oriented. I mean, we're certainly looking at patterns of behavior that have evolved over time. But instead of trying to dig deep into the why behind that, coaches are really more future focused. So, what they are doing is saying okay, you've had this experience happen to you. It makes sense that you would have these thoughts or have these feelings. Now, what? Where do you want to go with that? So, the coach is always bringing the client toward the future, so they can help them identify goals and create a strategic action plan to help reach them. And I think that's one of the great things about coaching is that not only is it really goal oriented. It also helps people accomplish more than they might be able to do on their own. So, it really is a partnership. And perhaps that's one difference as well, sometimes with therapy there is a little bit of almost hierarchal or authority piece there. Which makes sense. Therapists are the experts in mental health treatment. And so, they do tend to take more of the lead. In coaching, it really is a true partnership. The client is on an equal footing as the coach. And it's the client who's directing where the session is going. Who is establishing the agenda, who's choosing the goals. The coach's job is merely to help the client get exactly what they want.

**Allison:** Awesome. You said something, I guess some of what you were saying, brought me to one thing I want to say to folks who are listening who are probably predominantly therapists, is that coaches are not in competition with therapists.

**Lee:** Yes!! Say that again!

**Allison:** Louder for the ones in the back! And I see this sometimes in therapists. There seems to be this fear around coaches. Or why don't they just go to grad school. Or something like that. Coaches are not trying to be therapists. And I have been a part of a treatment team that included me and a coach. Because that was what was in the best interest of my client. And it was so great to be able to see how the work is different. And it can be really collaborative. So, if somebody listening is thinking, uh, coaches are just people who don't want to do the work of going to grad school or something like that. I do want to be really clear. That it's just a different job, essentially. And it can be just as effective for certain people as therapy can be.

**Lee:** Exactly. And I appreciate where therapists are coming from. Because it is coming from a place of wanting to protect their clients and prevent exploitation. They don't want clients to be working with untrained, unlicensed people. Because that can be dangerous. And I recognize that. What I would suggest is that if you're looking for a coach or if you know someone who is looking for a coach, you do need to do your homework to see if it's a reputable and trained coach. Unfortunately, right now, coaching is not regulated by the state. So how we have to go

through all sorts of training and education and mentoring and supervision to get our licensure, that is not a requirement for coaching. Anyone can hang up a shingle and call themselves a coach. And not only is that concerning to therapists, it's concerning to coaches as well. And so, what I would say is that, do your homework and look to find a coach who has completed a reputable coach training program. There are many options out there. One that I typically recommend is the International Coach Federation. They are the main body in the United States that credentials coaches and accredited coach training programs. So, if you are working with a coach that has an ICF credential, you know they have completed training, they've completed mentor coaching and so it gives you a little more certainty and security about who you are working with.

Now, certainly there are some wonderful coaches out there who are not credentialed through ICF, I don't mean to suggest that in order to be a good coach you need that credential. But, I will say it's just another measure to make sure that the person you are working with, or consulting with has had that training.

**Allison:** So, here's another question. How do you maintain boundaries if you simultaneously have a coaching and a therapy practice?

**Lee:** Yes. So, this is really important both to protect you and to protect the client. I believe the best practice is to keep everything separate. So, if you have both a therapy practice and a coaching practice, you need to have two separate business entities. You know, look at two separate populations, two separate marketing plans. And I know that seems like a lot of work and in some cases, maybe even redundant. But it really does benefit both the client and you. Because again, as we've already discussed, there is a lot of overlap between therapy and coaching. So, if you have one business where you are marketing therapy and coaching, that can really confuse clients. It can muddy the waters between how each works and what's going to be best for them.

It also can confuse clients because when they are working with a licensed mental health provider, they are entitled to certain legal privilege that coaching clients are not. And so, it's really important that when you are working with someone, they understand the benefits and the limitations that they have legally when they are working with you. The other thing is that coaching typically isn't covered by health insurance. So, if you are an insurance-based provider or if you accept out of network benefits, you want to make sure your potential clients aren't confused about what services they are receiving from you. And whether or not they might be covered by insurance. So that kind of addresses the client piece. But I also want to suggest that having to separate practices really limit your liability as a provider. Because that way if you're able to say no, I'm working with this client as a coach, and I'm seeing them under the auspices of my coaching business. Then, that's going to offer you a little more protection down the road if something were to happen. So, I think it's really important to clearly delineate between what you provide as a therapist and what you provide as a coach.

**Allison:** And I think sometimes people will kind of test the waters and say, I really want to work with this client out of state. I'm not licensed in that state. Can I just say I'm doing coaching? And the answer is no. you can't just say you're doing coaching. It has to be significantly different

than your counseling work and you have to be able to prove that to a board in some way. And having completely distinct businesses completely distinct paperwork. All of that. It covers you.

**Lee:** Exactly. And I think, too, just as many therapists use this specific approach, say they come from acceptance and commitment therapy or dialectical behavior therapy. When you are coaching you should also have a clear idea of the framework and approach you are using as well. Or at least a specific set of tools or strategies that you use with your clients and that's also going to help you clearly delineate between the work you do as a therapist and the work you do as a coach.

**Allison:** Yes. So, one last piece, too, about this delineation that I'm thinking about. Is in North Carolina and some other states, too. In order to become a PLLC for my therapy practice, I had to do all this weird communication between the licensing board and the state. They are linked. So, for those of you, particularly whose businesses, like the entity itself, has to go through your licensure board. It's important to also make sure that you're working within the scope of practice that your license provides. So, if you're doing business coaching, for instance, my license doesn't cover me there. Right? So, if I'm doing that under my license, I'm at risk of losing my license. So that's another really important reason to have them separate. So yeah. I know we just talked about all this like heavy legal stuff that nobody wants to hear, everybody just wants to be able to add "and coaching" to the end of their business. And I 100% get that. I am wondering, for people who are like, well I'm not sure I want to open up a whole other business and open up shop, like I don't have coaching experience outside of what might feel more like coaching in my therapy practice. How do I prepare or explore if it's even something I want to do?

**Lee:** I think the first thing to do is to talk to coaches. And talk to maybe therapists who have maybe transitioned 100% to coaching or who are running two simultaneous practices. Find out more about what they do. You know, ask if you can take them out for coffee, or have a virtual coffee chat. And just find out a little more about it. The benefit, the limitations, I think really making those connections will help answer any questions you have. But also set you up in a really good place for future networking should you decide to go into coaching. Because that's the thing, just as with therapy, coaches generally have specific niches. And so, what it does is it reduces competition and actually increases partnership within the profession. So, by reaching out and talking to a lot of different coaches, and kind of getting their perspective on the profession, if this is something that you decide to go into, then you can reconnect with them and it can actually be a potential referral source for you. So, I really think from just a relationship building perspective and from a knowledge gaining perspective, the first thing to do is to reach out and talk to other coaches.

Then, I would also do a little homework. I would kind of create a self-study program for yourself. Read some books on coaching. There are some excellent ones out there. I generally recommend, there's a book becoming a life coach for therapists by David Skibbins. And that's a terrific book. Even if you're not looking at life coaching. Even if you are looking more at business coaching or corporate coaching. He really kind of breaks down what it takes to transition to one approach to the other. So, I think starting with a book like that, reading some of Lynn Grodzki's books. She wrote I think, Building Your Ideal Private Practice. Which is a wonderful handbook for any provider out there. But she's also written several books on coaching. And so, again,

familiarizing yourself with a profession. And then, if you haven't actually experienced coaching yourself, then I would strongly consider investing in a coach. Even just for a couple sessions. So, you can have the experience of being a client. So that you know what that's like. You can start to differentiate for yourself. Oh, this is what's different about this experience versus therapy. And so not only can you observe it, as a perspective coach. But you'll also get great benefit personally and professionally from working with one.

**Allison:** Yeah. I love that advice. Because I think so much of my personal therapy practice has been informed by the therapy I've been in. you know? If you don't know what it looks like, it's really so much harder to do it. So, I think that's good advice.

**Lee:** So true.

**Allison:** And then, you mentioned niche. Should your niche, if you are doing a simultaneous coaching and therapy, two different practices, should your niche be the same? Should it be different? How does that work?

**Lee:** Honestly, I don't think there's one right answer to that. If you want to have a completely different niche for coaching than you do for therapy, go for it. And that will actually probably make it easier for you in terms of marketing and attracting clients specific for your coaching practice. If you do want to coach people that are similar to the niche of people you see for your therapy practice, I would do that, but I again, would be really clear on how the work you do as a therapist differs from the work that you do as a coach. So, you need to be really clear on the who and the why.... who are you seeing? Why are they seeing you? Also, the how. So, what's your process? So, for example, I know someone who calls herself an eating disorders recovery coach. And I'll be honest with you, when I first heard about it, it made me really nervous. Any time I hear someone creating a coaching niche around a diagnosable mental health disorder, I get a little nervous. But when I spoke to her, what I realized was, she herself, was a therapist with a background in treating individuals with eating disorders. And she had a very clearly differentiated program for those in recovery. She only worked with clients who had been working with a therapist. Who were in a healthy state. And then she knew how to support them afterwards, using a coaching approach.

If she ever felt that the client was regressing or needed additional treatment from a therapist, coaching stopped, and she referred them back to their original provider or helped them find a new provider if that was indicated. So, again, I would say you can have some similarities between your therapy niche and your coaching niche. But you need to be really clear on your approach and how you are working with those clients.

**Allison:** Yes. I love that. That's a great example. Okay, so then, what's the market for coaching? We're in a very therapist"y" community. Most of us. And so, I've heard a lot of people say I don't even know anybody who goes to a life coach. But then I also have other friends who are like, I only know people who go to life coaches. I don't know anybody in therapy. So can you talk a little bit about the market, is it easier or harder to attract clients and stay full than with therapy?

**Lee:** Yes, there's definitely a market for coaching. Although I would say it depends on what you provide? It depends on your rates. And it also depends on how you define full. What is a full practice for you, what would that look like?

So, I would say in terms of, is it easier or harder to attract clients, I would say It's probably comparable. Maybe a little more difficult than say a therapist who is strictly private pay who doesn't accept insurance. I'd say It's probably comparable to that for a typical life or business coach. And so that means you do need to really be clear on who you are, your approach, who you work with. And marketing becomes incredibly important if you are interested in pursuing a coaching practice. I would say, It's important to think about who it is you want to work with. And what is going to appeal most to them. So, part of the reason I went into coaching was because I had that personal experience with being stressed out and overwhelmed. Watching my husband go through it starting his business. Honestly myself going through it as I'm starting mine. So, here I am, a business owner, and the spouse of a business owner. And I really saw, this is a need. And I knew that therapy wasn't necessarily the best vehicle to serve this population. Because if you were to talk to my husband he wouldn't see himself as needing therapy. He would just say he's really stressed out trying to build this business. So, that's why, in that case, I think there's definitely a market for coaching with that population. Because he's probably right. He's not necessarily meeting criteria for any mental health disorder. He is experiencing general stress and overwhelm that is impacting his ability to be an optimal business owner. And so that's why when you are asking what's the market for coach, and certainly on location, but also who you want to work with. Because coaching, again, you can do telephone coaching. You can do virtual coaching. I do a lot of my coaching using zoom or skype. And so again, It's just really important to know what are your clients needs and how are they going to view the solution. And so then, you can frame yourself as that solution for them.

**Allison:** Yes. I love that. Somebody asked in one of the groups, is it hard to market to the specific population. And the truth is, It's not hard to market to any specific population if you have what they want and need. So, It's just making sure you communicate that well.

**Lee:** Exactly. And the best way to communicate that is to use the language your ideal client is using, himself or herself. So, as you're building your coaching business, talk to people you would want to work with. And not to pitch them on your services, but to say listen, I'm really interested in working with people who share a lot of similarities to you. And I would love to know your thoughts about this. Can I ask you a few questions? And then, really pay attention. Not just to the content of what they're saying, but to the language as well. Because the words they are using are going to be the best tool for them communicating back to your ideal audience.

**Allison:** Absolutely. And this just made me think about how my experiences with coaches, It's so different than my experience with therapy, like as a client. Because so many of us are in this very therapist-y communities. We got therapist friends. We got, you know, we're just surrounded by all this validation of emotion. That sometimes It's really nice to have somebody say, like no, that's just your fear. Do the action anyway. And to be like oh, oh yeah. I don't have to ruminate about the fear and tell you where it came from. And how it manifests and where I feel it in my body. I can just pick up the phone and make the hard call. You know?

Lee: exactly. Exactly. And I think that really gets back to what you said before, this is not a therapist versus coach environment. Truly, again, coming from that abundance mindset, there's enough out there for everyone. And all of us. So, it doesn't have to be a competition. And in fact, what I say to therapists, is to get to know the coaches in your community because they can be a great referrals source for you. Coaches don't want to provide therapy. And they know that they're not equipped to serve a client that really needs a therapist. So, by partnering with therapists in your community, you build up another referral source. So that this coach is going to think of you first, when they are working with someone and they think, you know what, this person's really better suited for therapy than coaching right now.

**Allison:** Absolutely. Oh, Lee, you are so smart. Thank you!

**Lee:** Oh no. thank you! This has been great!

**Allison:** And you are going to be our trainer in the party for August, helping us deep dive into this a little bit more for the party members. So, if you guys want more, you can check out Lee at [Caravelcoaching.com](http://Caravelcoaching.com). We would also love to have you in the party with a bunch of really dedicated private practice builders. And that's at [Abundanceparty.com](http://Abundanceparty.com). Thanks so much, Lee. I'll see you soon.

**Lee:** Thanks Allison.

Thanks for joining us on the Abundance Practice Podcast. Check out this week's show notes for relevant links, resources and homework. If you're new to private practice, check out the free checklist you need to get started at [Abundancepracticebuilding.com/checklist](http://Abundancepracticebuilding.com/checklist). And if you need more support, check out the Abundance Party at [abundanceparty.com](http://abundanceparty.com). See you next week!